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ABSTRACT

The need for and use of internal consultants by many organizations and institutions is growing because of the rapid pace of environmental and technological change and the growth in the quantity of knowledge. Although much has been written about consulting roles, competencies and skills needed by consultants, and the use of consultants in various situations, very little of this literature differentiates between external and internal consultants or compares the pros and cons of each. The personal experience of two internal consultants to the agriculture and home economics faculty in the Minnesota Extension Service has demonstrated the benefits to be derived from the direct relationships with program area administrators that internal consultants are in a position to have. Because these internal consultants have some expertise in the respective subject matter areas in which they provide consultation services, they are able to provide a link between highly specialized subject matter experts and equally specialized communications experts. As many agencies, organizations, and institutions attempt to change in order to serve new clientele markets, they often find the need to consult with individuals who have expertise in the field of lifelong learning. Internal consultants with such expertise can help develop lifelong learning programs that are appropriate and realistic in terms of their organization's resources, goals, and staff. (MN)

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THE ROLE OF THE INTERNAL CONSULTANT
IN IMPLEMENTING LIFELONG LEARNING

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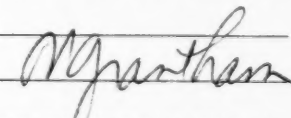
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THE ROLE OF THE INTERNAL CONSULTANT IN IMPLEMENTING LIFELONG LEARNING

Mention the term "consultant" to many people and you are likely to find that their understanding of that word is an outside expert who assists an organization or institution with a specific need germane to the consultant's expertise. Although this definition is essentially accurate, many people do not realize that consultants can also be staff members of organizations and institutions as well as independent of them and that, in fact, the number of these "internal" consultants is growing.

The need for and use of internal consultants by many organizations and institutions is growing because of the rapid pace of environmental and technological change (Kelley, 1979) and the growth in the quantity of knowledge (Dekom, 1969). These changes necessitate greater specialization of staff skills and more organizational flexibility. Increased flexibility, however, produces "cracks" in organizational systems, such as lack of coordination among decentralized units. Consequently, the impetus for internal consultants emerges from the need to have someone within the organization who can create and maintain essential expertise and implement recommendations for improving organizational functions (Dekom, 1969).

The authors of this paper function as internal program planning and communications consultants in an adult education organization, the Minnesota Extension Service, and believe that internal consultants can play an important catalytic role in implementing lifelong learning in a variety of organizations and institutions. We also think that adult educators in general can be more effective if they are aware of and practice consulting skills in working with subject matter experts.

What does the literature say about the role of the internal consultant vis-a-vis the external consultant?

A search of the literature in the management field, as well as of those sources more closely related to education, revealed that a good deal has been written about consulting roles, competencies and skills, use of consultants in various situations and so forth. However, very little of this information differentiated between external and internal consultants and the pros and cons of each sub-role. Among the few who addressed this topic were Dekom (1969), Lippitt and Lippitt (1978) and Kelley (1979).

Lippitt and Lippitt (1978) defined consultation as a two-way interaction--a process of seeking, giving and receiving help. Consulting is aimed at aiding a person, group, organization or larger system to mobilize internal and external resources to deal with problem confrontations and change efforts.

Lippitt and Lippitt (1978) cited as consulting roles those of advocate, informational expert, trainer/educator, joint problem solver, alternative identifier-linker, fact finder, process counselor and objective observer/reflector. Kelley (1979) and Dekom (1969) agreed that the internal consulting role includes environmental sensing, screening of information, troubleshooting, analyzing research and other information, preparing recommendations for administrators, teaching and assisting in implementing new programs.

Lippitt and Lippitt (1978) summarized what they feel are essential consultant competencies -- knowledge, skills and attitudes. These are

Knowledge areas

1. Thorough grounding in the behavioral sciences;
2. An equally thorough foundation in the administrative philosophies, policies, and practices of organizational systems and larger social systems;
3. Knowledge of educational and training methodologies, especially laboratory methods, problem-solving exercises, and role playing;
4. An understanding of the stages in the growth of individuals, groups, organizations, and communities

- and how social systems function at different stages;
5. Knowledge of how to design and help a change process;
 6. Knowledge and understanding of human personality, attitude formation, and change;
 7. Knowledge of oneself: motivations, strengths, weaknesses, and biases;
 8. An understanding of the leading philosophical systems as a framework for thought and a foundation of value systems.

Skill areas

1. Communications skills: listening, observing, identifying, and reporting;
2. Teaching and persuasive skills: ability to effectively impart new ideas and insights and to design learning experiences that contribute to growth and change;
3. Counseling skills to help others reach meaningful decisions on their own power;
4. Ability to form relationships based on trust and to work with a great variety of persons of different backgrounds and personalities; sensitivity to the feelings of others; ability to develop and share one's own charisma;
5. Ability to work with groups and teams in planning and

implementing change; skill in using group dynamics techniques and laboratory training methods;

6. Ability to utilize a variety of intervention methods and the ability to determine which intervention is most appropriate at a given time;
7. Skill in designing surveys, interviewing, and other data collection methods;
8. Ability to diagnose problems with a client, to locate sources of help, power, and influence, to understand a client's values and culture, and to determine readiness for change,
9. Ability to be flexible in dealing with all types of situations;
10. Skill in using problem solving techniques and in assisting others in problem solving.

Attitude areas

1. Attitude of a professional: competence, integrity, feeling of responsibility for helping clients cope with their problems;
2. Maturity: self-confidence, courage to stand by one's views, willingness to take necessary risks, ability to cope with rejection, hostility, and suspicion;
3. Open mindedness, honesty, intelligence;

4. Possession of a humanistic value system: belief in the importance of the individual; belief in technology and efficiency as means and not ends; trust in people and the democratic process in economic activities.

Similarly, Dekom (1969) indicated that effective consultants are bright, analytical, perceptive of key issues, diplomatic, articulate, skilled in writing, broadly experienced, hardworking, temperamentally suited to a staff role and expert in their specializations. He also noted that consultants must have strong personal ethics. Often the success of an assignment depends more on the individual involved and how that person acts and is accepted than on the pure logic of the improvement opportunity.

When discussing the pros and cons of internal vs. external consultants, the authors were not in total agreement. Lippitt and Lippitt (1978) tended to feel that the internal consultant had more limitations than did Dekom (1969) and Kelley (1979).

Lippitt and Lippitt (1978) compared internal and external consultants on the basis of (1) exploring the client's readiness for change, (2) desired outcomes, (3) time perspective and accountability, (4) force-field diagnosis, (5) action planning and client involvement, (6) successful action taking, and (7) evaluation and feedback.

In terms of (1) exploring readiness for change, Lippitt and Lippitt (1978) felt that internal consultants may encounter impediments to change because their qualifications are known to the client system, while external consultants are able to more openly test the system.

Lippitt and Lippitt (1978) also indicated that while internal consultants have a better grasp of the feasibility and need for (2) desired outcomes, external consultants may be better able to invoke a wider perspective on possible goals and more brainstorming of possible outcomes.

On (3) time perspective and accountability, Lippitt and Lippitt (1978) stated that internal consultants would have more difficulty arriving at some criteria for evaluation and termination or continuation but should be closer to the flow of data about the success or nonsuccess of helping efforts. In contrast, the external consultant was seen as having an easier time proposing objective evaluation procedures and obtaining the client's commitment to provide the necessary data for evaluation. Also, Lippitt and Lippitt indicated that external consultants usually work with the time perspective of an ad hoc relationship, with accountability expected sooner than do internal consultants.

Internal consultants are usually aware of the existence of diagnostic data and able to recommend appropriate targets for data collection for (4) force-field diagnosis, according to Lippitt and Lippitt (1978). However,

these authors felt that internal consultants are also more likely to create defensiveness and resistance in the system. Therefore, it would be easier for external consultants to request unfamiliar types of data collection and use newer methodologies.

In terms of (5) planning for action and client involvement, internal consultants probably have more knowledge and more access to knowledge about the potential resource value of persons and units who should be involved at the various stages in problem solving (Lippitt and Lippitt, 1978). However, external consultants were seen as having greater leverage on obtaining involvement of "high power" client figures.

Internal consultants are better able to judge (6) successful action taking because they can continuously observe activity in the client system and therefore better assess skill levels and and skill development needs, according to Lippitt and Lippitt (1978). However, they indicated that external consultants probably have greater leverage for introducing skill development activities and initiating "stop sessions" to look at progress and review process issues.

With the advantage of being in closer touch with the change process, internal consultants usually are more able to secure (7) evaluation and feedback at strategic points but run the risk of having people in the client system hide information and problems (Lippitt and Lippitt, 1978).

In contrast, external consultants can more easily introduce new methodologies for getting feedback data and can legitimately convene analysis and feedback sessions with appropriate personnel, according to Lippitt and Lippitt.

Dekom (1969) and Kelley (1979) surveyed sizable numbers of practicing internal consultants in business and industry. They indicated that except in certain special circumstances, the employment of inside consultative expertise was more desirable than contracting with external consultants. Kelley stated that the potential benefits of hiring internal consultants include rapid response, personal accountability and thorough consideration of the realities of implementation of organizational change plans, cost effectiveness in terms of more services per dollar expended and a training ground for developing the global perspectives of future managers or providing a transition phase for experienced managers nearing retirement. Dekom mentioned the need for implementation of recommendations, costs of external consultants and the need to create and maintain expertise in the system as being the three reasons he favored internal consultants.

Dekom (1969) cited the following as situations where external consultants are needed:

1. The organization's identity must be hidden;
2. There is peak demand for trained staff;

3. Unusual expertise is needed;
4. There is a heavy general backlog of projects;
5. The appearance and fact of complete objectivity
are necessary;
6. Serious internal political problems exist.

Kelley (1979) indicated essentially the same considerations with the addition of (6) the administrator desires an outside opinion in addition to the internal consultant's recommendations. All three sources also endorsed having internal and external consultants work as a team when external expertise is needed.

What We Have Learned From Our Experiences As Internal Program Planning and
Communications Consultants

At the University of Minnesota we function as internal program planning and communications consultants to the agriculture and home economics faculty in the Minnesota Extension Service (MES). We have split appointments between the Agriculture and Home Economics Program Areas and the communications support unit and we report to the appropriate assistant dean and director, as well as to the communications unit head. We have found these direct relationships to the program area administrators to be extremely important in functioning successfully in our internal consulting roles because in extension organizations the program planning and development process and

related decisions regarding communications and educational materials development occur within the program areas.

In our internal consulting roles, we share our knowledge of adult learning and development, program development and evaluation, communications technologies and selection of alternative communications strategies for delivery of educational information with faculty members who are the subject matter experts. We assist our faculty clients in planning informal, noncredit educational programs and developing educational materials for adults in rural and urban settings in Minnesota. So, our roles are very similar to the earlier definition of an internal consultant and came about because of one of those "cracks" in the organizational system, lack of coordination among decentralized units. We also provide a link between the highly specialized subject matter experts and the equally specialized communications specialists. Therefore, we have found that having some expertise in the respective subject matter areas of our experts in agriculture and home economics, as well as an understanding of communications, has been very helpful to us in building trust and gaining credibility with both groups.

Although we do not claim to possess all of the competencies that Lippitt and Lippitt (1978) described as essential for consultants, we do agree that most of them are very important. We certainly have found ourselves needing most of these kinds of knowledge, skills and attitudes as we go about our

work.

We generally agreed with Dekom's (1969) and Kelley's (1979) assessments of the internal consultant role much more than we identified with the limitations cited by Lippitt and Lippitt (1978). Lippitt and Lippitt's concerns seem to be directed more at consultants who are organizational developers than at persons emphasizing program planning and communications expertise as we do. One additional difference between the internal and external roles that they did not address is choice of clients. As internal consultants we do not have a choice of who we work with--we must try to work well with all of our faculty specialists. Our credibility depends in part on maintaining good relationships throughout our respective program areas. Otherwise, disgruntled clients can "spread the word" to others that we are not to be trusted.

We also have found that internal consultants need to know something about general strategies for planned change (Kerr, 1978). The land grant university/extension service concept is a rational-empirical change model. This change strategy assumes that the target clientele will recognize their need for change and voluntarily adopt the innovations disseminated to them. Kerr indicated, and we agree, that this model is rarely successful when used alone. Elements of normative, re-educative and "political" models are almost always also needed to facilitate change.

Kerr (1978) and Cramer (1983) indicated that providing valued resources, such as expertise and access to financial support, are valuable assets that educational communications consultants can utilize to help overcome the subject matter experts' natural tendencies to refuse to admit that they need help. These authors also noted that such consultants need to act as linking agents, i.e., to have detailed knowledge of local situations in order to adapt new technologies, acquire outside resources and encourage innovation among clients. Enthusiasm for clients' ideas and empathy with their individual needs and time frames are extremely important also. Cramer particularly suggested the need for consultants to use counseling skills such as attending (use of body language and prompts), focused questioning, reflecting and summarizing, as well as focusing on clients' needs to demonstrate empathy and establish credibility. We totally agree with these authors' statements.

Based On the Literature and Our Experiences, What Kinds of Roles Can Internal Consultants Play In Implementing Lifelong Learning?

Many agencies, institutions and organizations who previously served only certain segments of the population, such as colleges and universities who traditionally catered to the 17 to 22 year old age group, are broadening their clientele market and targeting new audiences because of shifts in population age distributions. As these organizations attempt to change in order to serve new clientele markets, they often find that their faculty

and staff members lack the necessary knowledge of lifelong learning to make changes in approaches and programs. Thus the need develops for new expertise in lifelong learning and for retraining and reorienting existing faculty and staff.

Such "ecological" change and increasing specialization in the field of education result in a situation where consultants can play an important role in helping organizations make the transition to lifelong learning. The consultant's role in this transitional phase is one full of opportunities for those professionals who have or are willing to acquire consulting skills and hazards for the unprepared. Internal consultants must deal with impossible or inappropriate demands, vague goals and people who want to put crash programs in place and ask questions about longer range goals later. Expertise is needed in strategic planning and marketing, as well as program planning, implementation and evaluation to make lifelong learning a reality. The challenge is great but the appropriate use of consulting skills can play an important role in the implementation of lifelong learning.

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